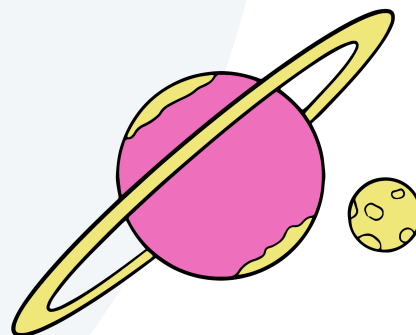# Shopify Conversion Rate Optimization Checklist

When elements of both your site and your marketing campaigns affect a visitor's odds of sticking around, continuing to click, and making a purchase, it can be difficult to know where to begin the CRO process.

Based on Major Tom's approach to Shopify optimization, we've built this list to jumpstart your efforts, with bite-sized, actionable improvements covering both your website and your marketing. Remember: optimizing your site doesn't happen overnight. Approach it as mini projects or tackle it all at once - however quickly you want to see big results - the key is to get started.

Website Optimization

Your website's architecture needs the right balance between UX and SEO. Its structure should reflect your brand story, showcase your full product and service offering, and address your users' specific needs and expectations.

01   **General Improvements**

Let's start with some changes that will affect every page on your site.
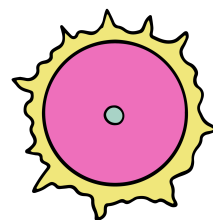
✦   Device Optimization

Does your site render correctly across all supported devices? ☐ Yes ☐ No

Are your button sizes optimized for both mobile and desktop? ☐ Yes ☐ No
Mobile buttons should be a minimum of 1cm square (28x28 pixels), or your users will struggle to tap through with their finger.

Have you implemented "sticky" button placement for mobile? ☐ Yes ☐ No
This keeps your buttons visible and top-of-mind as a user scrolls further down the page.

✦   Performance Optimization

Have you audited image sizes and optimized accordingly? ☐ Yes ☐ No
Tools like TinyPNG can help you reduce the file size of your images. We recommend keeping them under 150kb, where possible. Burning data doesn't win customers.

Are your images saved in the correct format? ☐ Yes ☐ No
JPEG by default, PNG where you need transparencies (e.g. your logo), GIF for animation.

Have you run a Google PageSpeed Insights loading test? ☐ Yes ☐ No
This will flag any issues with the loading speed of your site, and provide recommendations for improving it further.

Have you removed any unnecessary Shopify apps? ☐ Yes ☐ No
Outdated or redundant apps will consume site resources and slow performance, even if you aren't actively using them. Aim to be as minimal as possible.

Has your site enabled browser caching for returning customers? ☐ Yes ☐ No

✦ Design Optimization

Are your CTAs displayed prominently? ☐ Yes ☐ No
Your important CTAs should be above the fold, and you can use sticky buttons or sprinkle appropriate CTAs throughout each page to ensure they're easy for visitors to find and use.

Are your calls-to-action uncluttered? ☐ Yes ☐ No
Consider using pop-ups for secondary CTAs (like email collection) to keep from overcomplicating your cart page and driving customers away.

Have you used colors to highlight important elements & CTAs? ☐ Yes ☐ No
Color-coding buttons can help your customers distinguish between priority CTAs (like "add to cart") versus secondary CTAs (like "subscribe here"), and guide their attention accordingly.

Have you A/B tested your CTA performance? ☐ Yes ☐ No

Have you incorporated brand colors into your site design? ☐ Yes ☐ No
Not only is this an easy way to build a brand identity that your customers will remember, but it can help influence how they feel about their purchase.

Have you performed an accessibility check of your site? ☐ Yes ☐ No
Properly accessible design expands your audience and boosts your SEO rating. Try tools like Sortsite Desktop, Dynomapper, and Accessibility Developer Tools by Google for an accurate rating and actionable tips to improve.

Do your pages have an obvious visual and content hierarchy? ☐ Yes ☐ No
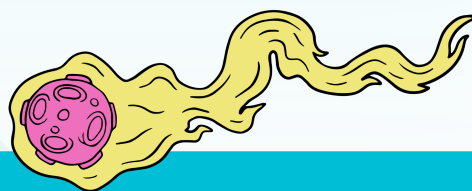*Trying to make everything equally important and eye-catching to your users will have the opposite of the intended effect.*

Have you done a spelling and grammar review of your copy? ☐ Yes ☐ No

Does your site include customer testimonials to build trust? ☐ Yes ☐ No

✦ Site Structure Optimization

Have you cut or combined unnecessary product categories? ☐ Yes ☐ No
Aim for 4-6 main categories with subcategories, if necessary. You can use internal search query data to sort these by popularity and better respond to visitor interest.

Do you have a custom 404 page with links? ☐ Yes ☐ No
Connecting directly to your most popular collections, products, and promotions will provide useful landing spots for a visitor and help guide them back to active pages.

Do you have a blog? ☐ Yes ☐ No
A key reason to have a blog is to greatly improve your SEO - allowing more prospective customers to find you. It is also a great way to engage with customers, make announcements, support your social media efforts and build brand loyalty.

Have you done an SEO pass on your page title tags? ☐ Yes ☐ No
Title tags and meta descriptions are one of the most important on-page factors for your SEO. They help match your page to visitor intent, and help returning users find it in their bookmarks or history.
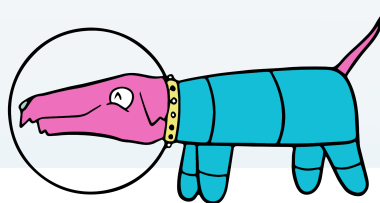
02   Homepage

Does your homepage include dynamic promotions and sign-up offers?   ☐ Yes   ☐ No

Welcome bars, pop-ups, pop-unders, and other dynamic display elements can help boost your sign-ups and sales as visitors arrive. Apps like Privy or Popup can help you find the balance between attention-grabbing and intrusive.

Does your homepage include an Instagram feed?   ☐ Yes   ☐ No

Have you implemented real-time purchase notifications?   ☐ Yes   ☐ No

A sense of urgency helps to encourage action from your users, and displaying live purchases with an app like Fomo Social Proof will help. Seeing others' purchases can also build trust in your product quality.

03   Product Pages

Do you display your product and photo reviews on each page?   ☐ Yes   ☐ No

Are your product descriptions written persuasively?   ☐ Yes   ☐ No

Make sure to emphasize benefits, not features. If you're explicit about what a customer stands to gain / what sets your product apart, it will encourage purchases.

Is your descriptive text clear and well-organized?   ☐ Yes   ☐ No

Use subheadings and bullet points where possible. If your customer can find the relevant info in a couple of seconds, they're more likely to convert.

Have you updated your product images and video?   ☐ Yes   ☐ No

Images are most visitors' first impression of a product, and should be high-quality and detailed. When appropriate, use videos, but host and embed them from sites like YouTube and Vimeo to save server space.

Are you using the metafields to provide more valuable information?   ☐ Yes   ☐ No

Are your forms set to prefill customer information?   ☐ Yes   ☐ No

Do you have a clear refund policy?   ☐ Yes   ☐ No

Words like "free", "easy", and "hassle-free" will grab customer attention and add a sense of security to their purchase.

Do you have a clear shipping policy?   ☐ Yes   ☐ No

Do you highlight relevant incentives, warranties, and guarantees?   ☐ Yes   ☐ No

Does your site have upsells, cross-sell, or bundling functionality?   ☐ Yes   ☐ No

This is a powerful way to improve your average order size and revenue.

04 Contact Page

Do you have a prominent email address or contact form? ☐ Yes ☐ No

Does the page include your physical location? ☐ Yes ☐ No
Make sure a map and directions are also featured.

Are your retail store hours displayed? ☐ Yes ☐ No
Be sure to keep these updated with any changes such as holiday closures.

Have you linked to your active social media profiles? ☐ Yes ☐ No

Do you have support-specific contact options? ☐ Yes ☐ No
Include a phone number or email — an easy route to site and product support will help conversions and reduce friction for your visitors.

Marketing Optimization

Your site optimizations depend on a strong marketing machine to bring in new visitors. But the returns speak for themselves: for example, for every $1 you spend on email marketing, you can expect an average return of $42 (DMA, 2019).
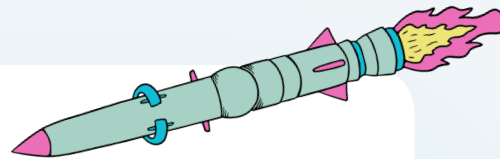
01 **User Journeys**

Have you planned a strategy for your user journeys?   ☐ Yes ☐ No
Interviewing stakeholders, customers, and employees can help you identify the priorities for your various sequences (e.g. welcome series, abandonment and win-back sequences).

✦ Do you know what your users' fears are?   ☐ Yes ☐ No

✦ Do you know what your users' desires are?   ☐ Yes ☐ No

✦ Do you know what your users' end goal is?   ☐ Yes ☐ No

✦ Have you identified the product benefits that address them?   ☐ Yes ☐ No
Always remember to focus on your products' benefits, not their features. Your customers shouldn't have to guess what they stand to gain by shopping with you — explicitly addressing their concerns, desires, and goals will highlight the value of your catalogue.

✦ Have you recently exported updated customer lists?   ☐ Yes ☐ No
This will help you build custom audiences and start lookalike targeting to bring in new customers who fit your business.

✦ Do you have an evergreen new customer acquisition funnel in place?   ☐ Yes ☐ No
These are your Always-On Journeys — self-sufficient, demand-generation campaigns that target the people searching for your products. They'll help you find users similar to your ideal target customer profile. Used properly, that means more reach and less time searching for prospects.

✦ Do you have lookalike campaigns in place?   ☐ Yes ☐ No
These should be based on existing fan and customer profiles, and include Google, YouTube, Facebook, and Instagram.

✦ Have you set up post-purchase email sequences?   ☐ Yes ☐ No
These recognize customers' first purchase and should encourage repeat visits with an incentive for their next purchase. Basic's include order confirmation and shipping notifications.

✦ Do you have a retention and re-engagement funnel in place?   ☐ Yes ☐ No
Selling to an existing customer is always easier (and cheaper) than converting a new one. This funnel should start with a softer sell — but by continuing to nurture customer relationships through customer win-backs sequences you'll improve your chances of selling to them again.

✦ Have you set up the Shop.pay integration for your store?   ☐ Yes ☐ No
Not only will this let you strategically follow up with customers (see the retention and re-engagement checklist above) but encouraging Shop.pay use can streamline their checkout process.

✦ Have you set up automated cart abandonment workflows?   ☐ Yes   ☐ No

These can include reminders through email & SMS, and should address the pain points that lead to abandonment:

○ Do you have data tracking tools in place for the checkout process?   ☐ Yes   ☐ No

○ Have you used user-journey mapping to build a plan to draw them back?   ☐ Yes   ☐ No

○ Have you A/B tested alternate journeys that bring users to your end goals?   ☐ Yes   ☐ No

○ Have you built out more than one abandonment email?   ☐ Yes   ☐ No

Try spacing out a series of emails with scaling incentives. For example, send the first immediately, a second after 24 hours, and a third after 48 hours with a 15% off promo code (with an expiry date to build a sense of urgency).

✦ Have you built out an upsell automation workflow?   ☐ Yes   ☐ No

Try automated reminders when a customer has likely finished most of their product, or send them a promotion on a related item that might also fit their interests.

✦ Do you have a referral automation workflow in place?   ☐ Yes   ☐ No

Encourage customers to review and share user-generated content on social platforms to build credibility. Shopify apps like ReferralCandy make it easy to start a referral program, or you can implement a custom solution for your needs.

✦ Have you set up social media promotions?   ☐ Yes   ☐ No

✦ Do you have exclusivity-based marketing campaigns in place?   ☐ Yes   ☐ No

This can include VIP "pre-sale" announcements for subscribers or special member discounts.

02   Email Marketing

Have you optimized your email marketing approach?   ☐ Yes   ☐ No

✦ Do you leverage a mix of videos and images in your content?   ☐ Yes   ☐ No

✦ Are your emails personalized to the recipient?   ☐ Yes   ☐ No

This starts with steps as simple as addressing the email to them by name, and can include custom content based on their previous behavior.

✦ Are your emails attributed to a specific team member?   ☐ Yes   ☐ No

Receiving an email from a person, rather than a business entity/department, helps your email to feel authentic and connect with the reader.

✦ Are you A/B testing your primary email content?   ☐ Yes   ☐ No

A/B testing your subject lines, send times, content groups, and CTAs can help you refine your approach to improve open rates and results.

✦ Have you tested your emails on different devices?   ☐ Yes   ☐ No

Be sure to open preview versions to ensure your emails and designs are optimized for mobile, tablet, and desktop users.

✦ Do your order confirmation emails include offers and CTAs?   ☐ Yes   ☐ No

These emails tend to see the highest open rate by far. Take advantage by encouraging readers to sign up for your newsletter, link them to content on your blog, or offer them exclusive discounts and promotions for future orders as a thank you for buying.
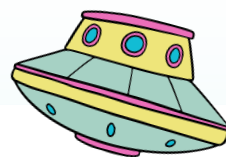
03 Google

Have you optimized your Google campaigns? ☐ Yes ☐ No

✦ Is Google Analytics properly configured with your Shopify? ☐ Yes ☐ No

✦ Are you using eCommerce tracking in Google analytics? ☐ Yes ☐ No
Used properly, you can enable and test eCommerce tracking to track online sales in more detail.

✦ Do you have a customized Google Analytics dashboard? ☐ Yes ☐ No

✦ Is your Google Product Integration in place? ☐ Yes ☐ No

✦ Have you synced your Shopify product database (along with prices, images, and barcodes/GTINs) to Google? ☐ Yes ☐ No
Be aware: syncing your catalogue with Google requires specific integration with privacy and shipping policies, tax information and other verifications.

✦ Are you running Shopping Ads as well as regular Google Ads? ☐ Yes ☐ No
Shopping ads require more administrative legwork, but the results are worth it. You'll need to submit product data using the right form and format your Merchant Center feed using a set of product data specifications. Be meticulous here – most Google sellers fail to get their products past the Merchant Center.

✦ Are Google Search Console and Google Local My Business set up and running? ☐ Yes ☐ No

✦ Have you optimized Google Shopping feeds for search console? ☐ Yes ☐ No

✦ Have you submitted your sitemap.xml file to GMP? ☐ Yes ☐ No

✦ Have you optimized your product titles? ☐ Yes ☐ No
This includes reviewing titles and descriptions according to Google optimization recommendations.

✦ Are your product titles SEO-ready? ☐ Yes ☐ No
Titles and descriptions help Google and Facebook understand what your products are all about – which helps them show your catalogue to more relevant shoppers. This also helps with Google searches and will affect how retargeting ads are displayed.

04 Facebook

Have you optimized your Facebook campaigns? ☐ Yes ☐ No

✦ Is your Facebook plugin configured in Shopify? ☐ Yes ☐ No

✦ Have you synced your Shopify product database to Facebook? ☐ Yes ☐ No
*Don't forget to include prices, images, and barcodes (GTINs).*

✦ Do you have an ad template for dynamic product retargeting? ☐ Yes ☐ No

✦ Have you designed ad templates for data merge in various fields? ☐ Yes ☐ No

✦ Have you created, tested, and launched your product feeds? ☐ Yes ☐ No

✦ Do you have a plan to boost your earned and organic media? ☐ Yes ☐ No

You should be ready to boost this content to the following audiences: customers, your email database, website visitors, fans and followers, and lookalikes.
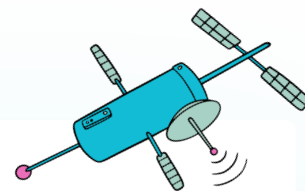
05 **SMS**

Do you have a plan for SMS outreach? ☐ Yes ☐ No

Do you have consent from clients you're messaging? ☐ Yes ☐ No

Are you tracking and improving your SMS messaging and timing? ☐ Yes ☐ No

06 **Paid media**

Is your Paid Media plan in place? ☐ Yes ☐ No

✦ Have you calculated your ROAS for each of your active channels? ☐ Yes ☐ No

✦ Is your Paid Media budget allocated based on channel performance? ☐ Yes ☐ No

To get the most out of your ad spend, make sure you reallocate to the channels that are performing the best. Be sure to reassess regularly, especially after making changes to your campaigns.

Once you've taken care of the biggest optimizations, here are a few places you can start pushing further:

Have you integrated Shopify with other channels such as Pinterest? ☐ Yes ☐ No

The best options will depend on your customers and product offering, but finding the right fit will expand your audience even further.

Have you incorporated Comparison Shopping Engines (CSEs)? ☐ Yes ☐ No

Platforms like Google Shopping, Shopping.com, or Shopzilla will help you find additional customers and can drive traffic directly back to your store page for a sale.

Do you have a plan to connect with an event-motivated audience? ☐ Yes ☐ No

These are the customers who buy primarily during holiday or promotional periods. They'll be more likely to return the following year if you can identify and entice them back to your store at the right time.

Do you have a timed email ready with holiday highlights? ☐ Yes ☐ No

Giving these customers a sneak peak at your seasonal sales or special promotions for high-volume periods like Black Friday & Cyber Monday can coax them back each year.

Do you have birthday- or anniversary-themed offers in place? ☐ Yes ☐ No

Websites like 1-800-Flowers have seen success catering to audience segments made up of customers shopping for birthdays or anniversaries. Because these events are annual, it creates a predictable cadence for reconnecting with customers and encouraging future sales.

Do you have working wishlist or "Save-for-later" functions? ☐ Yes ☐ No

Not every visitor will be ready to convert right away, but letting them save products with an app like Wishlist + Save for Later from Eastside Co increases the odds that they'll return. It can also help you remarket to potential customers through email.

Is your wishlist paired with relevant reminder emails? ☐ Yes ☐ No

Have you set up a rewards system? ☐ Yes ☐ No

This is another great way to turn hard-earned sales into repeat customers and build brand loyalty.

Do you have live chat functionality? ☐ Yes ☐ No

Honestly evaluate if you have the capacity for this feature. It's a great way to engage with shoppers if so, but an abandoned live chat won't do your store any good.

Does your live chat integration include conditional targeting? ☐ Yes ☐ No

The best chat apps will let you engage browsers on certain pages, after they've been on your site for a certain length of time, or even based on how they arrived (from an email link, for example).

Do you have a product recommendation quiz running? ☐ Yes ☐ No

This interactive feature is especially great for stores with large catalogs or stores that sell products that have specific features/benefits (e.g. skin care products). This helps customers find the right product for them and also supports upsells.


✦   Are you feeling ready to evolve your Shopify store?

In today's marketing landscape, optimizing your eCommerce is a project that is never done. True optimization takes the discipline to regularly and rigorously analyze and review your approach. Any implementation - be it a campaign or a website - can be adjusted, enhanced, and refined.

This is the process of continuous engagement that is required to better engage and grow your audience. Successfully listening to what visitors tell you with their clicks, their scrolls, their likes, and their transactions will give you the info you need to provide an unforgettable experience. Once you've done that, you'll deliver results that both you and your customers can be happy with.
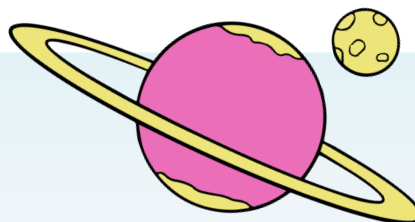
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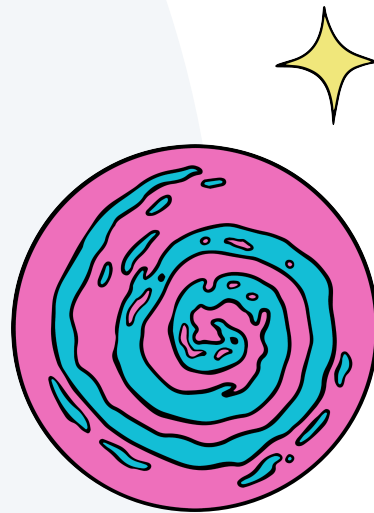📞 +1 (604) 642-6765

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